

Donor Qualification Scale

Introduction: Personal contact with individuals is the most effective strategy of generating financial support for any organization. Successful fundraising starts by identifying high-capacity prospects who align with your mission and vision.

Use this Donor Qualification Scale to:

1. Identify qualified prospects.
2. Strategize how to move the prospect closer to a financial gift.

Name of prospective donor: _____

Rate this individual being considered for a personal contact on the following five criteria. The rating is on a scale of one (1) to five (5). One being very low and five being very high.

CRITERIA #1

From the prospective donor's viewpoint how much credibility does the asker have?

Rating (between 1 & 5)	Weight	Total
	X 6 =	

A Rating of 1: The asker has never met the prospective donor. The appointment has been generated by a cold call.

A Rating of 5: The asker is a close personal or business friend of the prospective donor. They are known by others to be very good friends. Their high level of mutual trust is common knowledge.

CRITERIA #2

How valuable or important is the mission of the organization from the prospective donor's viewpoint?

Rating (between 1 & 5)	Weight	Total
	X 5 =	

A Rating of 1: The prospective donor has no known history of giving to this type of ministry. The prospect is deeply committed to a narrow range of ministries that does not include ministries like yours. The prospect is known to have questioned the validity of ministries like yours. The organization has had a recent history of negative public relations.

A Rating of 5: The prospect has a long history of involvement with and giving to ministries like yours. The prospect has recently experienced a "*personal high*" as the result of contact with your ministry.

CRITERIA #3

The prospective donor's history with your ministry.

Rating (between 1 & 5)	Weight	Total
	X 4 =	

A Rating of 1: The prospect knows nothing about the ministry or the organization. The prospect has a history of avoiding contact with the organization.

A Rating of 5: The prospective donor has a long history of personal giving to your ministry. The prospect has initiated the conversation.

CRITERIA #4

The communication method and atmosphere.

Rating (between 1 & 5)	Weight	Total
	X 3 =	

A Rating of 1: The prospective donor will be solicited by letter or email.

A Rating of 5: The prospective donor and spouse will be personally interviewed in their home. The prospect enthusiastically welcomes the opportunity for personal contact.

CRITERIA #5

The "*life station*" of the prospective donor

Rating (between 1 & 5)	Weight	Total
	X 2 =	

A Rating of 1: The prospective donor is either/or a combination of:

- a non-Christian
- young, immature
- irregular employment
- financial setback

A Rating of 5: The prospective donor is either/or a combination of:

- a dynamic Christian
- mature
- consistent income
- a reputation for generous giving

Now total the right-hand column and register that number here: **TOTAL** _____*

* The following scale will help you decide your step of action with this prospective donor.

IF THE TOTAL WAS	REACTION
80-100	A great prospect. Why are you still reading this document? Schedule the appointment!
60-80	A good prospect. Prepare well and go with confidence.
50-60	A potential prospect who may need some more cultivation before you ask for a gift.
40-60	A possible prospect. You're probably months away from the stewardship question. Start the conversation.
1-40	Probably, not a prospect!